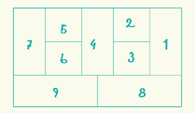
IEA DSM | task 25 - Switzerland

Different businessmodels | **Businessmodels** | **Capabilties** | **Context** | **Cases**

Pushing harder



Businessmodels

1. Customer Segments
Industrial/commercial

2. Customer Relationships
Distant, not personal, no focus on user needs or user barriers

3. Channels
Traditional, focus on cold acquisition

4. Value proposition
Functional benefits and technical specs are the core of the proposition

5. Key activities
Focus on hardware and software, developing resellers channels and training resellers and clients

6. Key resources/skills
Technical, sales knowledge and tech knowhow

7. partners and suppliers
Hierarchical/ value chain. Resellers and intermediaries for sales purposes

8. Revenue Streams
One off, transaction based
Maintenance fee

9. Costs
Traditional, focus on personnel and material

Capabilties

User Sensing
Not in a structured way

Conceptualizing
Not in a structured way

Orchestrating
Not in a structured way. Focus on the supply chain side

Scaling and stretching
Outsourcing the sales skills.

Context

Experience: fragmented market, no clearly defined competitors, weak - or lack of policies and regulation, lack of user's trust in product. No clear perspective on orientation of stakeholders

Reaction: pushing, demand regulatory creation, label certification, procurement rules.

Strategy: unaware market changer

Cases

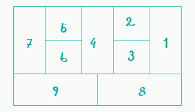
Total solutions

Smart solutions

Retrofitting

lighting and heating

Reframing/referral



Businessmodels

1. Customer Segments
Consumers, industrial, commercial

2. Customer Relationships
Standardised. More personal and tailored

3. Channels
Traditional. Word of mouth

4. Value proposition
Reframing by acknowledging that energy efficiency is low on the buyers priority list

5. Key activities
Focus on hardware and software, tackling fragmentations, process optimisation

6. Key resources/skills
Technical, sales knowledge and tech knowhow. Partners become resources

7. partners and suppliers
More equal. Focus on co-creation. Choice of partners based on branding quality and matching

8. Revenue Streams
Transaction based. Goodwill creation

9. Costs
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Capabilties

User Sensing
Weakly developed. Collecting user insights up to transaction. Strong focus on specific details in transaction journey (like decision making, info needed or simplifiing process, trust building)

Conceptualizing
Shifting focus from delivery process towards tailoring value proposition and buyers satisfaction

Orchestrating
Buy-transaction journey orchestration well developed. Public private partnerships to boost sales and trust

Scaling and stretching
Branding to create competitive edge. Quality and ease as differentiating elements

Context

Experience: lack of consumer demand for Energy Efficiency and savings. Fragmented market.

Reaction: focus on developing client relationships. Building trust. Piloting and experiment

Strategy: smart matcher

Cases

Total solutions

- GroupE Tygr Ench - Switzerland
- SIG Commun d'immeuble - Switzerland

Smart solutions

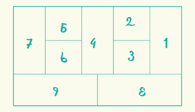
Retrofitting

- GroupE Lighting - Switzerland

lighting and heating

- Julia Dusche - Switzerland

Pushing something else



Businessmodels

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Expanding segments from B2C with a B2B2C segments

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Direct and personalised

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Data and ICT become enabler of delivering value

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Personnel and material. Technological innovation

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Well developed. Systematic. Active co-creation becomes key activity

Conceptualizing
Active conceptualizing, however technological barriers are inhibiting. Moving towards multiple benefit innovation

Orchestrating
Problem solvers. Delivering complex services. Or become original equipment manufacturer (OEM)

Scaling and stretching
Tech barriers still hard to overcome. Marketing in traditional way

Context

Experience: lack of consumer demand for Energy Efficiency and savings. Fragmented market.

Reaction: become problem solvers. Deliver other benefits then EE.

Strategy: aware/stealth

Cases

Total solutions

Smart solutions

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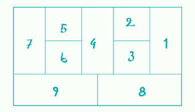
lighting and heating

Servicing



Businessmodels

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Users are fans

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Multichannel. Tailored

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Fluid value proposition, customized

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Building relationships across the user life cycle. Following changes in the value proposition. Datamining and collecting user intelligence

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User, use phase, data

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Equal partnerships, user is considered as a partner

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Crowdfunding, memberships, goodwill

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Investment in 'vision'

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Co-creating. Growth of client base is inhibiting the ambition to grow

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Context

Experience: opportunities. Their target market is not considered to be an EE market, but as a market that reflects their value proposition (lifestyle, smart home, etc.)

Reaction: responsiveness

Strategy: aware/stealth

Cases

Total solutions

Smart solutions

- BEN Energy - Switzerland

Retrofitting

- Evalo - Switzerland

lighting and heating

IEA DSM | task 25 - Netherlands

Different businessmodels

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Pushing harder

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Total solutions

Smart solutions
- Greeniant - Netherlands

Retrofitting

lighting and heating
- Led design Holland - Netherlands

Reframing/referral

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Reaction: focus on developing client relationships. Building trust, Piloting and experiment

Strategy: smart matcher

Total solutions
- BAS - Netherlands

Smart solutions

Retrofitting
- Reimarkt - Netherlands
- Nederland Isoleert - Netherlands

lighting and heating
- Groupe E lighting - Netherlands

Pushing something else

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Reaction: become problem solvers. Deliver other benefits then EE.

Strategy: aware/stealth

Total solutions

Smart solutions
- Eneco Toon - Netherlands
- Woonconnect - Netherlands

Retrofitting

lighting and heating

Servicing

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Reaction: responsiveness

Strategy: aware/stealth

Total solutions
- Buurkracht - Netherlands

Smart solutions

Retrofitting

lighting and heating
- Philips - Netherlands

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IEA DSM | task 25 - Austria

Different businessmodels

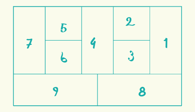
Businessmodels

Capabilties

Context

Cases

Pushing harder



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Reaction: pushing, demand regulatory creation, label certification, procurement rules.

Strategy: unaware market changer

Total solutions

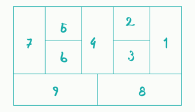
Smart solutions

- Mywarm - Austria
- Messpunkt - Austria
- Netconnect - Austria

Retrofitting

lighting and heating

Reframing/referral



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Context

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Reaction: focus on developing client relationships. Building trust. Piloting and experiment

Strategy: smart matcher

Total solutions

- Click for Climate - Austria
- Leistungsgrupp - Austria

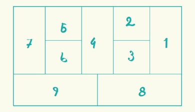
Smart solutions

Retrofitting

- EPC+ - Austria

lighting and heating

Pushing something else



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Reaction: become problem solvers. Deliver other benefits then EE.

Strategy: aware/stealth

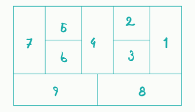
Total solutions

Smart solutions

Retrofitting

lighting and heating

Servicing



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Context

Experience: opportunities. Their target market is not considered to be an EE market, but as a market that reflects their value proposition (lifestyle, smart home, etc.)

Reaction: responsiveness

Strategy: aware/stealth

Total solutions

Smart solutions

Retrofitting

lighting and heating

DuneWorks ideate service | design | innovation ieadsm

IEA DSM | task 25 - Sweden

Different businessmodels

Pushing harder

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Strategy: unaware market changer

Cases

Total solutions

Smart solutions

Retrofitting
- Cremab - Sweden

lighting and heating

Reframing/referral

Businessmodels

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Context

Experience: lack of consumer demand for Energy Efficiency and savings. Frag-mented market.

Reaction: focus on developing client relationships. Building trust. Piloting and experiment

Strategy: smart matcher

Cases

Total solutions
- Friendly buildings - Sweden

Smart solutions

Retrofitting
- Ahlsell - Sweden
- Humlagadan - Sweden

lighting and heating

Pushing something else

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Reaction: become problem solvers. Deliver other benefits then EE.

Strategy: aware/stealth

Cases

Total solutions

Smart solutions
- Exibea - Sweden
- Ferro amp - Sweden

Retrofitting

lighting and heating

Servicing

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Reaction: responsiveness

Strategy: aware/stealth

Cases

Total solutions
- ETC - Sweden

Smart solutions

Retrofitting

lighting and heating

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IEA DSM | task 25 - Norway

Different businessmodels | Businessmodels | Capabilties | Context | Cases

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Reaction: pushing, demand regulatory creation, label certification, procurement rules.

Strategy: unaware market changer

Total solutions	Smart solutions	Retrofitting	lighting and heating

Reframing/referral

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Reaction: focus on developing client relationships. Building trust. Piloting and experiment

Strategy: smart matcher

Total solutions	Smart solutions	Retrofitting	lighting and heating
	- HyttaMi - Norway - Sikom - Norway	- Bolig Enøg - Norway	

Pushing something else

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Total solutions	Smart solutions	Retrofitting	lighting and heating
	- Serinus - Norway - Tiny Mesh - Norway - Future home - Norway	- Otovo - Norway	

Servicing

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Total solutions	Smart solutions	Retrofitting	lighting and heating
- Filago - Norway - Hvaler - Norway	- Meshcrafts - Norway		

IEA DSM | task 25 - Overview

Different businessmodels

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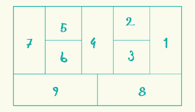
Cases

Pushing harder



Businessmodels

1. Customer Segments
Industrial/commercial

2. Customer Relationships
Distant, not personal, no focus on user needs or user barriers

3. Channels
Traditional, focus on cold acquisition

4. Value proposition
Functional benefits and technical specs are the core of the proposition

5. Key activities
Focus on hardware and software, developing resellers channels and training resellers and clients

6. Key resources/skills
Technical, sales knowledge and tech knowhow

7. partners and suppliers
Hierarchical/ value chain. Resellers and intermediaries for sales purposes

8. Revenue Streams
One off, transaction based
Maintenance fee

9. Costs
Traditional, focus on personnel and material

Capabilties

User Sensing
Not in a structured way

Conceptualizing
Not in a structured way

Orchestrating
Not in a structured way. Focus on the supply chain side

Scaling and stretching
Outsourcing the sales skills.

Context

Experience: fragmented market, no clearly defined competitors, weak - or lack of policies and regulation, lack of user's trust in product. No clear perspective on orientation of stakeholders

Reaction: pushing, demand regulatory creation, label certification, procurement rules.

Strategy: unaware market changer

Total solutions

- Austria
- South Korea
- Netherlands
- Sweden
- Norway
- Switzerland

Smart solutions

- Mywarm - Austria
- Messpunkt - Austria
- Netconnect - Austria
- Greeniant - Netherlands
- Megacon - Sweden
- Climacheck - Sweden
- E-smart - Sweden

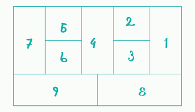
Retrofitting

- Cremab - Sweden
- Eco solution - South Korea

lighting and heating

- Led design Holland - Netherlands
- Eco solution - South Korea

Reframing/referral



Businessmodels

1. Customer Segments
Consumers, industrial, commercial

2. Customer Relationships
Standardised. More personal and tailored

3. Channels
Traditional. Word of mouth

4. Value proposition
Reframing by acknowledging that energy efficiency is low on the buyers priority list

5. Key activities
Focus on hardware and software, tackling fragmentations, process optimisation

6. Key resources/skills
Technical, sales knowledge and tech knowhow. Partners become resources

7. partners and suppliers
More equal. Focus on co-creation. Choice of partners based on branding quality and matching

8. Revenue Streams
Transaction based. Goodwill creation

9. Costs
Traditional, focus on personnel and material

Capabilties

User Sensing
Weakly developed. Collecting user insights up to transaction. Strong focus on specific details in transaction journey (like decision making, info needed or simplifiing process, trust building)

Conceptualizing
Shifting focus from delivery process towards tailoring value proposition and buyers satisfaction

Orchestrating
Buy-transaction journey orchestration well developed. Public private partnerships to boost sales and trust

Scaling and stretching
Branding to create competitive edge. Quality and ease as differentiating elements

Context

Experience: lack of consumer demand for Energy Efficiency and savings. Frag-mented market.

Reaction: focus on developing client relationships. Building trust. Piloting and experiment

Strategy: smart matcher

Total solutions

- Click for Climate - Austria
- Leistungsgrupp - Austria
- BAS - Netherlands
- Friendly buildings - Sweden
- GroupE Tygr Ench - Switzerland
- SIG Commun d'immeuble - Switzerland

Smart solutions

- HyttaMi - Norway
- Sikom - Norway

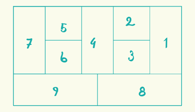
Retrofitting

- EPC+ - Austria
- Reimarkt - Netherlands
- Nederland Isoleert - Netherlands
- Ahlsell - Sweden
- Humlagadan - Sweden
- Bolig Enøg - Norway
- Evalo - Switzerland
- Eco solutions - South Korea

lighting and heating

- Groupe E lighting - Netherlands
- Julia Dushe - Switzerland
- Eco solutions - South Korea

Pushing something else



Businessmodels

1. Customer Segments
Expanding segments from B2C with a B2B2C segments

2. Customer Relationships
Explicitly and actively creating partnerships with users. Entering new niches

3. Channels
Direct and personalised

4. Value proposition
Delivering multiple benefits (other than energy efficiency) in an integrated way

5. Key activities
Collecting and handling user and usage data

6. Key resources/skills
Data and ICT become enabler of delivering value

7. Partners and suppliers
Explicitly service oriented partners that help deliver complex packages. Partners that also can be a launching customer

8. Revenue Streams
Subscription fee. Client retention, goodwill and retention

9. Costs
Personnel and material. Technological innovation

Capabilties

User Sensing
Well developed. Systematic. Active co-creation becomes key activity

Conceptualizing
Active conceptualizing, however technological barriers are inhibiting. Moving towards multiple benefit innovation

Orchestrating
Problem solvers. Delivering complex services. Or become original equipment manufacturer (OEM)

Scaling and stretching
Tech barriers still hard to overcome. Marketing in traditional way

Context

Experience: lack of consumer demand for Energy Efficiency and savings. Fragmented market.

Reaction: become problem solvers. Deliver other benefits then EE.

Strategy: aware/stealth

Total solutions

- SIG Eco Social - Switzerland

Smart solutions

- Eneco Toon - Netherlands
- Woonconnect - Netherlands
- Exibea - Sweden
- Ferro amp - Sweden
- Serinus - Norway
- Tiny Mesh - Norway
- Future home - Norway
- BEN Energy - Switzerland
- Gridwiz - South Korea

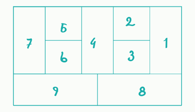
Retrofitting

- Otovo - Norway

lighting and heating

-With light - South Korea

Servicing



Businessmodels

1. Customer Segments
Users are fans

2. Customer Relationships
Built on trust and long term

3. Channels
Multichannel. Tailored

4. Value proposition
Fluid value proposition, customized

5. Key activities
Building relationships across the user life cycle. Following changes in the value proposition. Datamining and collecting user intelligence

6. Key resources/skills
User, use phase, data

7. Partners and suppliers
Equal partnerships, user is considered as a partner

8. Revenue Streams
Crowdfunding, memberships, goodwill

9. Costs
Investment in 'vision'

Capabilties

User Sensing
Core capability

Conceptualizing
Co-creating. Growth of client base is inhibiting the ambition to grow

Orchestrating
Aimed at serving the user during the use phase

Scaling and stretching
Aimed at continiuous innovation

Context

Experience: opportunities. Their target market is not considered to be an EE market, but as a market that reflects their value proposition (lifestyle, smart home, etc.)

Reaction: responsiveness

Strategy: aware/stealth

Total solutions

- Buurkracht - Netherlands
- ETC - Sweden
- Filago - Norway
- Hvaler - Norway

Smart solutions

- Meshcrafts - Norway

Retrofitting

- Samchully ES - South Korea

lighting and heating

- Philips - Netherlands

DuneWorks ideate ieadsm

IEA DSM | task 25 - South Korea

Different businessmodels | Businessmodels | Capabilties | Context | Cases

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Pushing harder

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Smart solutions

Retrofitting
- Eco solution - South Korea

lighting and heating
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Retrofitting
- Eco solution - South Korea

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Total solutions

Smart solutions
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lighting and heating
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